

Town of



AMHERST *Massachusetts*

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To: John Musante, Town Manager
From: Stephanie O'Keeffe, Select Board Chair
Date: August 27, 2012
Re: FY12 Town Manager Performance Evaluation

The Select Board is pleased to provide you with our evaluation of your performance in your second year as Amherst's Town Manager.

This memo and the attached composite ratings grid serve as your official performance evaluation for FY12. These documents summarize all the ratings from the individual evaluation forms submitted by all five Select Board members, and the comments on points where we have broad agreement. Each member's form is also included for your information, but because our authority is vested in the full body, only the composite documents represent the Select Board's position.

Our goal is to give you feedback that will help you do your job better: identifying areas where we feel your performance is strong, as well as areas that we believe would benefit from more attention. This is more art than science, as each of us brings our own interpretation to the expectations and goals as described, as well to the definition of each rating. The point is to broadly capture and report our collective sense of how well you are doing this job.

As an assessment of your second year, this performance evaluation shows continued appreciation of and admiration for your work. It is clear to all that you embrace this job. You bring great enthusiasm to serving Amherst, and you have made impressive progress in important areas. There is a positivity surrounding Town Government these days that owes much to your talents, manner and leadership. The Select Board and the community strongly support you, and we thank you for your fine work this year.

Per each of the evaluation areas, the results are as follows:

Fiscal Management

The Select Board again gives you very high marks for fiscal management. Particular appreciation is expressed for your skillful initiatives to reduce costs, including the important transition of retired teacher's health care coverage to the Town's insurance trust from the State's GIC plan. You earned **100% Commendable** ratings for preparation of the budget, complying with Select Board budget policy guidelines, and administration of the approved budget. Continued strong support is expressed for the solar project and its potential economic benefits. Your leadership on the Business Improvement District (BID) initiative and changes to the permitting and inspections area are noted with appreciation for advancing economic development opportunities.

Relationship with the Select Board and Town Meeting

The Select Board gives you very high marks for your relationship with us – including **100% Commendable** on the topic of maintaining a professional and effective working relationship. Once again, your efforts to keep us informed at and between meetings, and the effectiveness of our working relationship are noted with praise. Comments reflect strong appreciation for how you interact with us, collectively and individually.

Your presentations to Town Meeting, with thorough preparation and clear communication, earned **100% Commendable** from the Select Board. And it is important to emphasize that the Select Board fully supports your right to vote at Town Meeting and to advocate for your positions. Voting is an explicit permission granted to you by the Town Government Act, and we encourage that, along with your providing opinions about any measure you feel impacts the best interests of the town. The Select Board and the community depend on your recommendations in such matters, at Town Meeting and beyond. We recognize that this is a subject on which reasonable people can disagree, and that until there is more clarity on time limit issues for front table speakers, those disagreements may be exacerbated by perceptions of undue privilege.

Long Range Planning

Highest praise and enthusiasm go to your work on green initiatives, which have been a hallmark of your tenure in this role. The Select Board rated your fulfillment of this performance goal as **100% Commendable**, and called out for special appreciation the successful achievement of Green Community status and the grant opportunities that represents. The continuing work on the solar project at the old landfill on Belchertown Road is noted with continued strong support, and your tree-planting initiative received much acclaim.

The Select Board gives you good marks for staying informed about new technologies and systems related to Town government.

The performance goal about creating a detailed assessment of Town buildings is a priority for the Select Board and remains unfulfilled this year.

Comments and ratings about the performance goal for creating a staffing plan to help prioritize future hiring indicate that further clarification by the Select Board is needed to ensure we and you have the same understanding of what is being requested before we can expect you to fulfill that.

Staff and Personnel Relations

This category had the most distributed ratings and comments. As the most critical area of management, it is appropriate that it should receive the most detailed assessment, with the intent being to help you continue to improve on your leadership abilities for the benefit of Town staff and the full community.

The ratings for the performance goal about assessing the Town's Human Resources needs were inconclusive. Select Board members used a variety of ways to express that despite the formal assessment being still-pending, your recruiting practices, handling of sensitive personnel issues and hiring of a new H.R. Director are all indicators that you recognize the priority of this area and are moving it in the right direction. Your record of hiring outstanding people to enhance Town staff was noted by all.

Successful conclusion of collective bargaining with the employee unions, and keeping the Select Board informed throughout that process, received high marks.

Communication with staff and cultivating high morale received **80% Satisfactory** for the performance goal, but comments expressed in a variety of ways that this is an area that would benefit from more attention. A recurring theme was how increasing your engagement with staff and your recognition of their work could help to ensure that everyone feels included for their important role in accomplishing the business of the Town. This has been and will continue to be a key Select Board priority. It is an area that is admittedly difficult for us to assess, so we rely on information from you about specific efforts in this regard, along with the formal and informal feedback we receive from staff. The Select Board will be working to improve how we collect staff feedback, and we look forward to your finding new ways of engaging and appreciating staff at all levels.

Community and Intergovernmental Relations

The Select Board gave you high marks for how you engage with and inform our community. You earned **100% Commendable** on your service as spokesperson for the Town, as well as for staying apprised of relevant issues in surrounding towns and with our local institutions of higher ed. Comments noted the value of your effective and frequent use of press releases. The Town-Gown relationship was noted with praise for its different facets of partnership, including work with UMass on off-campus issues and creation of the Safe and Healthy Neighborhoods Initiative. Select Board members expressed confidence in your ability to sustain and grow relationships with all three institutions, each of which has exciting new leadership. Your service on the PVTa Advisory Board and the benefits that brings to the larger community was recognized.

The performance goal about strengthening the relationship with the University and Colleges received ratings of **87% Satisfactory or above**, and the performance goal about engaging the community about successes and challenges rated **94% Satisfactory or above**.

The timeliness of some of your responses to e-mails and other inquiries was identified as an area needing improvement last year. This year, progress was noted, as was the need for more.

General Expectations

In the General Expectations category, Select Board members called out the following as particular strengths: professionalism, listening skills, public speaking, and advocacy with the State and Federal government. Additionally, your leadership and oversight of the Town's Emergency Operations team during the aftermath of the October snowstorm received special recognition as examples of excellent crisis management skills. That event followed closely on your seven-week emergency medical leave, a time when the business of Town government continued smoothly in your absence, thanks to the first-rate management team you had put in place.

FY12 Performance Goals

The performance goals established for FY12 were incorporated into the appropriate sections of the evaluation form, and comments on them are likewise incorporated in the categories above.

Highest marks were for the following:

- Goal #1 – Fiscal management/economic development: **100% Satisfactory or above**
- Goal #2 – Strengthen UMass/Colleges ties: **87% Satisfactory or above**
- Goal #3 – Inform/be informed by community: **94% Satisfactory or above**
- Goal #6 – Working with Select Board: **100% Satisfactory or above**
- Goal #8 – Make Amherst greener: **100% Commendable**

Extra attention in the coming year was indicated for the following:

- Goal #4 – Staff morale and communication: **80% Satisfactory**
- Goal #7 – Assessment of Town buildings: **80% Needs Improvement or below**

Ratings on two goals are inconclusive, because they require the fuller context of discussion and comment.

- Goal #5 – H.R. assessment: The H.R. assessment was postponed while the new Director was hired and is expected in FY13, but there have been strong positive indicators about your priorities for effective Human Resources operations.

- Goal #9 – Staffing plan: needs the Select Board to clarify its expectations before we can evaluate your performance.

Evaluation Process Information

This document summarizes all Select Board members' individual evaluation forms, with comments reflecting majority sentiments reflected on those forms or agreed upon during discussion at the August 20th Select Board meeting. Informing the Select Board evaluations are: our personal observations, impressions and interactions throughout the year; feedback received informally during the year from staff members and members of the public; and feedback received through formal solicitation during the evaluation process. This year, Staff Questionnaires were sent to 237 staff members, and 30 were returned. In response to soliciting comment from committees, Town Meeting members and the general public, we received 34 submissions.

In Conclusion

We hope you find it validating and informative to get feedback on the past year's performance to help inspire your work going forward. The Select Board appreciates the progress you have made in so many areas, the initiatives you have put forth, the successes you have achieved, and the ways you have handled challenges. We thank you for your tremendous service and we look forward to another great year.